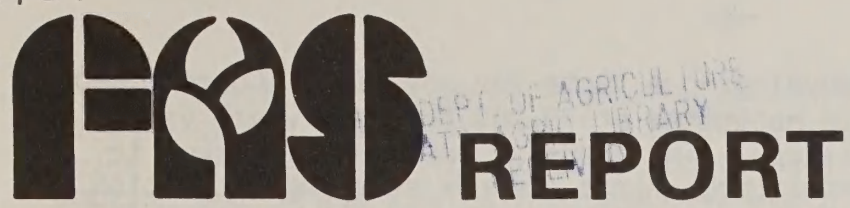


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WEEKLY ROUNDUP OF WORLD PRODUCTION AND TRADE

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WR 14-83

WASHINGTON, April 6--The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade:

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EC TRADE NOTES

The European Parliament's Committee on Agriculture has prepared a report rejecting the EUROPEAN COMMUNITY (EC) Commission's proposed 4.4 percent average agricultural support price increase for 1983/84. Instead, the report calls for an increase of not less than 7 percent, much along the line requested earlier by COPA, the European farm organization. Agricultural support prices were raised an average 10.5 percent for the 1982/83 crops--the steepest price increase in the 15-year history of common agricultural prices.

The report also rejected the Commission's co-responsibility measures aimed at curbing cereal overproduction and aligning the Community's cereal prices with world prices. Under those measures, the support price increases now under discussion would be adjusted downward if 1982/83 production exceeded a previously determined guaranteed threshold. Although that threshold was exceeded, the Committee considers the Commission's attempts to align EC and world cereal prices to be neither realistic, nor appropriate. Contrary to the Commission, the Committee sees no reason for penalizing EC farmers for what it considers to be the EC's financial problems caused by imports of nongrain feed ingredients at reduced or duty-free rates.

OILSEEDS AND PRODUCTS

JAPAN is expected to import 4.4 million tons of soybeans in 1983, equaling the previous record set in 1980. After declining in 1980 and 1981, mixed feed production grew by 4.6 percent in 1982. This recovery is expected to continue through 1983, although at a slightly lower pace as egg producers reduce production. As a result, increased demand for soybean meal for livestock feed, combined with tighter rapeseed supplies, is expected to result in a moderate increase in soybean crushing in 1983.

The U.S. market share was nearly 97 percent of the 4.3 million tons of soybeans Japan imported in 1982. Most soybeans from the United States are used for crushing, but about 650,000 tons of U.S. soybeans are used for food products, particularly tofu. Canadian and Chinese soybeans are imported strictly for food use. They are purchased on the open market and production is not contracted in advance. Chinese soybeans are favored for miso, fermented bean paste, because they are higher in carbohydrates and lower in oil. Most U.S. soybeans for food use come from Indiana, Ohio and Michigan and are, therefore, known as "I.O.M." soybeans in Japan.

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JAPANESE consumers are developing a taste for soy milk. Current production of this soybean product is estimated at 70,000 tons per year, valued at 20-22 billion yen, or \$87.5 million. The industry expects the market to expand to 60 billion yen, as several large firms are now starting production. Currently, 11 major firms are producing soy milk, which comes in various flavors, as well as plain. Tofu shops also market soy milk. Soy milk-based processed foods such as soy milk puddings are also now on the market.

DAIRY, LIVESTOCK AND POULTRY

In ITALY, authorities have formally confirmed two outbreaks of African Swine Fever (ASF). The outbreaks occurred on two different farms in Northern Italy on March 18 and 25, respectively. This is the first outbreak reported since 1968, when the disease was eradicated from the mainland. Prior to these outbreaks, ASF in Italy was confined to the island of Sardinia. Thus far, two herds with over 5,000 hogs have been destroyed as authorities work to keep the disease from spreading.

The European Community has issued an EC-wide ban on pork imports from the Piedmont region of Italy. However, West Germany, the United Kingdom and Switzerland have banned pork imports from all of Italy. The United States currently can import only cooked pork products from Italy due to ASF in Sardinia and other animal health problems.

COTTON AND FIBERS

TURKEY reported 38 percent larger exports of textiles during 1982 despite trade restrictions placed on Turkish textiles by the European Community (EC), its largest customer. Textile exports reached \$1.1 billion and represented the largest industrial export. Exports of raw cotton increased in volume to 996,600 bales, but low world prices reduced the export value 15 percent to \$297 million.

The outlook for SYRIA's 1982/83 cotton crop continues to improve due to favorable growing conditions, greater planted area, a 20-percent increase in guaranteed procurement prices and efficient management techniques. In addition, producers are becoming more aware of the yield benefits in planting Aleppo 40, an earlier maturing variety. Because of the anticipated increase in production, more cotton should be available for export.

TOBACCO

Cigarette rationing in POLAND was discontinued March 21, and cigarette prices were raised by 23 to 73 percent per pack according to brand. Low-quality brands start at 21 U.S. cents per pack, while high-quality brands and imported cigarettes sell for up to 94 U.S. cents per pack. Cigarette rationing, in effect since July 1981, had applied only to domestically produced cigarettes, but since June 1982, higher priced domestic brands have also been exempted. Non-rationed cigarettes accounted for about 10 percent of total consumption.

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Discontinuation of cigarette rationing is due to an accumulation of sizable stocks and prospects of a relatively good tobacco crop. The sharp price increase apparently is intended to help achieve a balance between production and consumption and to reduce imports of tobacco leaf and cigarettes, which were at record levels in 1981.

INDIA's 1982 tobacco exports are reported at 86,000 tons, 18 percent below the record 104,862 tons exported in 1981. The Soviet Union was the largest buyer, taking 43,000 tons. China practically stopped its purchases of Indian tobacco in 1982, because of a record domestic crop, as well as reported disputes concerning the sub-standard quality of tobacco supplied by India in 1981.

Export prospects for 1983 are dimmed by uncertainty of the Soviet Union's purchases and indications that China may stay away from the Indian market. A further reduction in exports, following a record 1982 crop, may result in an accumulation of stocks and marketing problems in 1983.

MEXICO's 1983 tobacco production was recently estimated at 58,700 tons by TABAMEX, the government agency that controls the tobacco industry. The estimate included 21,600 tons of burley and 12,000 tons of flue-cured. This year's crop is down 23 percent from a year ago and the smallest in eight years as a result of unseasonable rains during the growing season and an outbreak of mosaic disease. Since the estimate, mid-March floods in the state of Nayarit have reportedly damaged the crop further, especially the burley. TABAMEX will soon complete a post-flood survey to assess the final harvest.

COFFEE, TEA AND COCOA

Tea production in 1982 for SELECTED COUNTRIES is estimated at 1.9 million tons, 3.6 percent above the 1.8 million tons produced during 1981. Production increased in all regions. India remained the world's largest producer--567,000 tons--in 1982, as production recovered somewhat from the 1981 level. Procured production in China increased to 381,000 tons, 11 percent over the 1981 level and 50 percent above the level six years ago. Weather problems in Sri Lanka reduced production there to 188,000 tons, down 10 percent from 1981. Japan's production remained relatively stable at 105,000 tons. In Africa, favorable weather resulted in higher production in Kenya and record production in Malawi. Production for selected countries and regions is as follows in 1,000 tons:

	1981	1982		1981	1982
ASIA:			AFRICA:		
India	561	567	Kenya	91	96
China	343	381	Malawi	32	38
Sri Lanka	210	188	Mozambique	22	20
Japan	102	105	Zimbabwe	10	11
Others	162	146	Others	46	47
Total	1,378	1,387	Total	201	212

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OTHER PRODUCERS:

Turkey	43	90
USSR	134	135
Others	73	71
Total	250	296

TOTAL SELECTED

COUNTRIES	1,829	1,895
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SUGAR

In the PHILIPPINES, centrifugal sugar production for 1982/83 is estimated at 2.58 million tons (raw value), 3 percent above last year's crop, but down slightly from earlier expectations due to a drought that began in November 1982. The worst impact has been on the islands of Panay and Negros, which account for about three-fourths of the country's sugar output. Greater damage from the continuing drought is expected to affect prospects for the 1983/84 crop, which is forecast to be down 10 percent from the 1982/83 estimate. Lack of rainfall is delaying preparation and planting in some areas, while drying in other areas will probably require replanting.

FRUITS AND NUTS

MALAYSIA's production of fresh pineapple is expected to increase for the second consecutive year. Total output for 1983 is currently estimated at 170,000 tons, up from 154,000 during the 1982 season. Extensive rehabilitation of plantations, the implementation of a fertilizer subsidy and larger replanting grants have improved not only production levels, but also fruit quality and yields.

Selected International Prices

Item	: April 5, 1983		: Change from	: A year
	:		: previous week	: ago
	\$ per MT	\$ per bu.	\$ per MT	\$ per MT
ROTTERDAM PRICES 1/				
Wheat:				
Canadian No. 1 CWRS-13.5%.	199.00	5.42	+1.50	202.00
U.S. No. 2 DNS/NS: 14%...	184.00	5.01	+6.50	187.50
U.S. No. 2 DHW/HW: 13.5%..	N.Q.	--	--	201.00
U.S. No. 2 S.R.W.....	163.00	4.44	+2.00	169.00
U.S. No. 3 H.A.D.....	180.00	4.90	+1.00	182.00
Canadian No. 1 A: Durum..	199.00	5.42	+1.00	195.06
Feed grains:				
U.S. No. 3 Yellow Corn....	146.00	3.71	+2.50	132.50
U.S. No. 2 Sorghum 2/.....	N.Q.	--	--	140.00
Feed Barley 3/.....	N.Q.	--	--	148.75
Soybeans and meal:				
U.S. No. 2 Yellow.....	252.75	6.88	+1.55	266.25
Brazil 47/48% SoyaPellets 4/	222.00	--	-2.50	N.Q.
U.S. 44% Soybean Meal.....	216.00	--	+1.00	233.00
U.S. FARM PRICES 5/				
Wheat.....	136.32	3.71	--	134.11
Barley.....	73.03	1.59	+4.13	82.21
Corn.....	115.35	2.93	+5.51	98.03
Sorghum.....	107.36	4.87 6/	+5.73	91.71
Broilers 7/.....	900.36	--	+27.78	893.96
EC IMPORT LEVIES				
Wheat 8/.....	96.92	2.64	+1.95	84.75
Barley.....	106.71	2.32	+1.44	74.70
Corn.....	80.51	2.05	-1.90	90.40
Sorghum.....	76.05	1.93	-1.97	80.08
Broilers 9/.....	305.00	--	-0-	270.00
EC INTERVENTION PRICES 11/				
Common wheat(feed quality)	183.64	5.00	+68	182.08
Bread wheat.....	201.63	5.49	+75	209.41
Barley and all				
other feed grains.....	183.64	--	+68	182.08
Broilers 12/.....	1093.00	--	-12.00	N.Q.
EC EXPORT RESTITUTIONS (subsidies)				
Wheat.....	N.Q.	--	--	64.59
Wheat flour.....	N.Q.	N.Q.	N.Q.	N.Q.
Barley.....	N.Q.	--	--	40.21
Broilers 9/.....	207.00	--	-0- 13/	169.00
Sugar, refined 15/.....	N.Q.	--	N.Q.	N.Q.

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Optional delivery: Argentine Granifero sorghum. 3/ Optional delivery: Canadian feed barley. 4/ Optional delivery: Argentine. 5/ Based on selected major markets and adjusted to reflect farm prices more closely. 6/ Hundredweight (CWT). 7/ Nine-city average; wholesale weighted average. 8/ Durum has a special levy. 9/ EC category--70 percent whole chicken. 10/ Reflects exchange rate change and not level set by EC. 11/ Reflects change by EC effective Feb. 1, 1983 from 31.8 ECU's/100 kg. to 33.15 ECU's/100 kg. **Reflects exchange rate change only. 12/ F.O.B Price for R.T.C. Whole Broilers at West German border. 13/ Subsidy increase reflects change by EC Effective Feb. 1, 1983 from 20.50 ECU's/100 kg to 22.50 ECU's/100 kg. 14/ F.o.b. price for whole R.T.C. broilers at West German border. N.Q.=Not quoted. Note: Basis April delivery.

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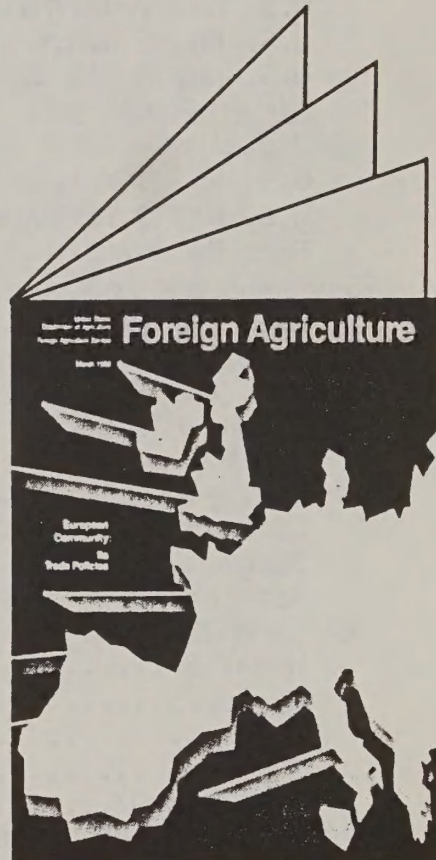
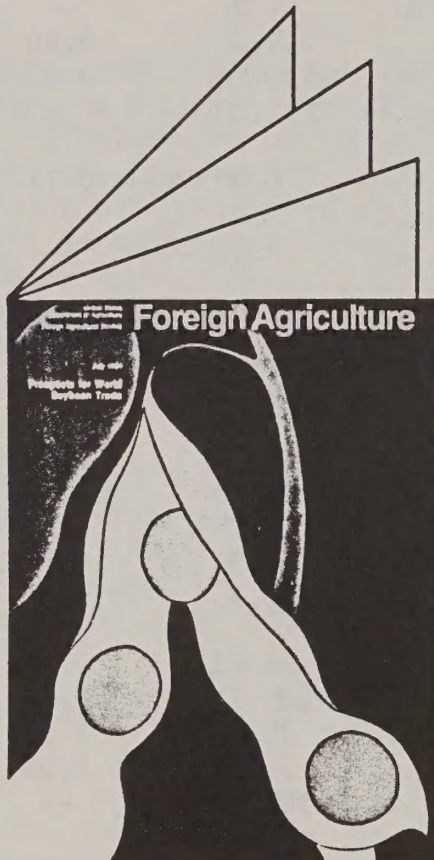
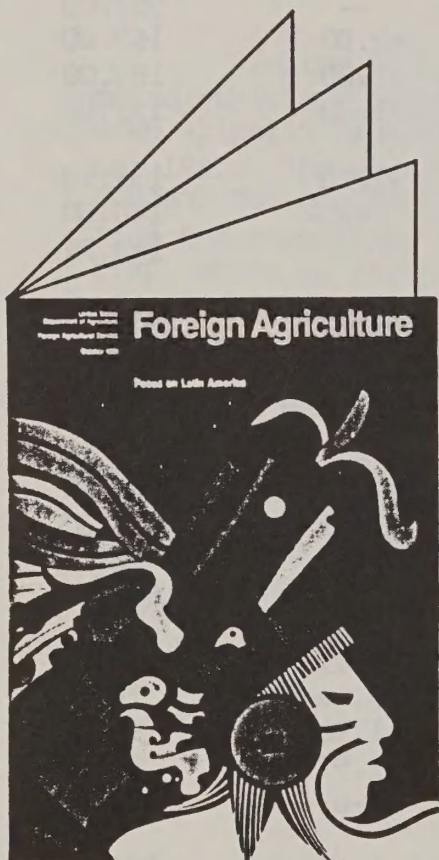
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